

MEMORANDUM

Date: 24 March 2003

To: SFC Respondents

From: Lyle Knudsen, DFCM

Reference: University of Utah
Utah Museum of Natural History – Exhibits and Masterplanning
DFCM Project No. 02243750

Subject: **Addendum Number 1**

Notices to Proposers

- 1.1. Please indicate on the cover of your submission in large font whether it is for “Architectural Program” or “Exhibits Master Plan.”

The deadline for submitting management plans, references, and statements of qualifications has been extended to Thursday, March 27, 2003 by 4:00 p.m. Submittals must be received by the DFCM receptionist by 4:00 p.m. in order to be considered timely. No other dates on the selection schedule will be changed.

The consultant selected for architectural programming will be eligible to compete for architectural design and the consultant selected for exhibit master planning will be eligible to complete for exhibit design.

The short-listed candidates will be expected to send one sample of their pertinent work (an architectural program or an exhibit master plan) prior to the date of their interviews, for review by the selection committee. The program/master plan will be returned at the time of the interview.

Questions and Answers

- 1.2. Q: It is my understanding from Lyle that HEWV will have one vote in the selection process.
- A: This is correct.
- 1.3. Q: Should references be from Lead Firm only or do you expect references from sub-consultants as well?
- A: If the limit of the length of the submittal allows you to include references from sub consultants you may. You should make a determination as to the importance of the particular sub consultant in the entire process.
- 1.4. Q: Does award of the exhibition master planning phase disqualify the contracted firm from participating in future phases of design?
- A: No.
- 1.5. Q: Having not seen previous plans, we wonder: What can the “Project Entities” identify as the most distinguishing aspect of exhibit master planning – distinguishing it from phase one master planning and conceptual master planning?
- A: The master plan, Phase I, does not include any exhibits plans. The conceptual plan contains some ideas for exhibits in the new building. In this phase we will produce the formal master plan for exhibits in the new building.
- 1.6. Q: Is it still anticipated that the planning and programming phase will be followed by a design competition, as identified in the Prescott Muir study?
- A: It is one method of delivery that is being considered.
- 1.7. Q: Are the preliminary costs identified in the Prescott Muir study (page E 12 of 14) relevant or applicable to this phase of work?
- A: They represent a guideline for us and are as relevant that preliminary budgets can be at this stage of the budget.
- 1.8. Q: What will the Facilitation Monthly Meeting agenda consist of? Will sub-consultants be asked to help define the agenda of these meetings?
- A: Monthly facilitation meeting agendas will vary in response to the project needs. Sub consultants will have input and a part to play in these meetings.

- 1.9. Q: We understand that the UMNH has toured comparative facilities. During the Architectural Programming Phase, is it the intent of the UMNH, the University, or DFCM to conduct any more group Tours of Comparative Facilities for this project?
- A: This is under consideration. It appears that we may postpone facility tours until later in the project, however, if there is an apparent need to visit a facility, this could be considered.
- 1.10. Q: What is a "Program Project Itemized Cost Summary" and how does it differ from the "project budget estimate"? (see Track II description)
- A: They are the same.
- 1.11. Q: What is the "performance plan" referenced in Procurement Process, page No.5, #14, first paragraph, last sentence.
- A: Delete the reference to the "performance plan". The selection will be based on the responses to the SFC.
- 1.12. Q: What means of primary communication will HEWV, the Project Facilitator, utilize to facilitate ease of information exchange between themselves, the Architectural Programming Team, and the Exhibits Master Planning Team, during the process? (i.e. dedicated website, or other electronic means)
- A: HEWV will hold internal / team files on a HEWV FTP site, and allow the University access for posting things on a project web site that the Museum will create and manage.
- 1.13. Q: Will the Track One and Track Two sub-consultants be able to contact each other directly during the project duration, or must each sub-consultant direct all communication through the Project Facilitator?
- A: Track One and Track Two sub-consultants will be allowed to communicate directly but must keep HEWV in the information flow via email, written summary of conferences, meeting minute notes, summary of phone communication, etc. We do not want to restrain conversation among consultants, DFCM, Museum, etc. with the tight schedule that we face. Open communication between all parties and thorough/accurate documentation is critical which will be required by all consultants involved.
- 1.14. Q: Does either the "Project Description, Part F." section of the solicitation or the "Procurement Process, parts 10, 11., & 12." Section take precedent over the other as far as required components of the submittal. There is some discrepancy between the two.

- A: Project Description Part F tells you that you may not apply for both Track One and Track Two, you must choose between them. Project description as contained in the SFC is a statement to acquaint the SFC Respondents with the parameters of the project. Parts 10, 11, & 12 describe elements to be submitted as part of the SFC. The various elements or components of the submittal should be organized in a manner to facilitate committee. Tabs are a common method of organization. I am unable to see the discrepancy between the two items.
- 1.15. Q: Is the “10 Management Plan” detailed and requested in the “Procurement Process” section of the solicitation expected to be bound separately from the “11 Statements of Qualifications” that is listed in the same section’ or are both components to be accommodated in the “Project Description, Part F.” section submittal outlines?
- A: All components of the SFC may be bound as one document and clearly indexed or tabulated to facilitate use by the selection committee. Project description as contained in the SFC is a statement to acquaint the SFC Respondents with the parameters of the project.
- 1.16. Q: Could you clarify that you are indeed requesting (3) documents; Track Response Document, Management Plan & Statement of Qualifications. Another interpretation is that the document requested as described on pages 5 & 6 is a specific outline of what is desired for the Statement of Qualifications.
- A: Project description as contained in the SFC is a statement to acquaint the SFC Respondents with the parameters of the project, therefore pages 5 and 6 are information for the SFC respondents, and not requirements of the SFC. Three components of the project are required in the SFC: The Track Response Document, Management Plan, and Statement of Qualifications. You may also choose to include items such as firm information, experience, and relevant resumes.

The following questions are organized by the session in which they came up. However, it is advisable that you read both questions and answers as many of them crossed disciplines between architecture and exhibits planning.

Questions and Answers during Exhibit Masterplanning Mandatory Meeting

- 1.17. Q: Describe your collections and what your aspirations are for them.
- A: We want to make the collections and our research programs accessible to the public. Most of the collections are regional in nature, with the exception of the turtles, minerals, and shells (malacology), which are worldwide in

scope. The latter two have been assembled more for exhibits and are not truly research quality assemblages. A quick summary of the research collections: vertebrate paleontology, especially dinosaurs—14,000; fossil plants especially strong in Triassic plants—4000; invertebrate paleontology is spotty; 2000 ethnographic objects; 750,000 in archaeology; 125,000 plants (never treated with poisons/fungicides/insecticides and therefore many can be germinated); 100,000 vertebrates. Our aspirations include: visible storage, spaces to change out collections in exhibits, make research process visible; connect the collections with people; give people an understanding of the process of science (get away from the exhibits showing science as a snapshot of our understanding at a particular time).

Q: What are some benchmarks? What is admirable to you among peer museums?

A: We cannot give a single example of a museum with all of the elements that we are interested in. UBC's visible storage and NCMNS's new walk-through environment are exemplary. We're interested in exhibits that are layered with levels of information for people with different levels of interest. We want opportunities for people to connect directly with people such as docents or scientists. We envision programs that can be built around exhibits and demonstration spaces that can accommodate this. We want exhibits that interpret the site. The exhibits should address issues that we are facing today: diversity across space and through time, evolutionary processes. We are not interested in "ology" halls.

Q: How does your vision manifest itself in terms of the visitor and in the way museum departments are organized?

A: In terms of back-of-house, we intend to organize collections, work areas, office in an interdisciplinary fashion rather than by discipline (i.e. by wet collections, dry collections, wet labs, clean labs, graduate students, faculty/curators, rather than a paleontology suite, archaeology suite, etc.). We then will extend that to the galleries which will be interdisciplinary in nature. Curriculum or gallery tours can be offered by discipline, and the experience thus can vary each time a visitor comes. We also would like to blur the lines as much as possible between the back-of-house and public spaces.

Q: Will exhibits be bi-lingual?

A: We do not anticipate bi-lingual label text, but would like to offer other means of interpretation in other languages (gallery guides, audio guides, etc).

Q: Has any other interpretive planning been done outside of the pre-planning study?

A: Yes, the staff has had some preliminary discussions and developed a philosophy for interpretation. This will be provided to the selected consultant.

Q: Is there any assumption/prediction of gate that is driving planning? How much pressure do you feel to deliver on those assumptions?

A: A 1995 business plan predicted annual visitation of 200,000 in a new facility. We are re-analyzing this projection and will have a current projection by mid-summer. Our funding is from a variety of sources, only one of which is gate.

Q: Will evaluation be part of this exercise?

A: Yes. Also, we have an ongoing program of visitor studies and evaluation. Those data will be provided to the selected consultant.

Q: Is the management plan part of the 35 page maximum for the submission materials?

A: Yes

Q: In the pre-planning study you allude to a major donor being consulted. Will that be an issue in the planning process?

A: No

Q: Is the location of the firm an issue?

A: No

Q: What is the actual submission date?

A: March 26, 2003

Q: Where do we submit?

A: Utah Division of Facilities Construction and Management, 4110 State Office Building, Salt Lake City, UT 84114

Q: Can firms submit for both contracts?

A: No

- Q: Can team members on an exhibit submission be sub-consultants on an architectural submission and vice versa?
- A: Yes, but it is redundant and we intend to execute two separate contracts with two separately selected firms.
- Q: Are exhibits master planners prohibited from competing for design?
- A: No
- Q: When will the architectural design bid be put out?
- A: Upon completion of the program, in approximately one year.
- Q: Will it be a design competition or a design-build competition?
- A: That has not yet been determined
- Q: Clarify formatting requirements for the proposal.
- A: 35 pages maximum, not including tabs. Tabs are encouraged. A firm brochure may be added.
- Q: How many copies?
- A: 8
- Q: Who will be evaluating proposals?
- A: The selection committee will be comprised of a representative of HEWV, Museum Director (Sarah George), University Facilities Planning (Kari Astle), Building Board Member (Kay Calvert), DFCM Representative (Matthias Mueller) and a community representative selected by DFCM (Becky Hawkins, Gould Evans). Museum staff, board, and other University personnel will also be reading proposals and providing input to the committee.
- Q: What is the status of the funding?
- A: Half of the funding for the entire project has been raised (pledged, authorized, or in-hand)
- Q: Talk about how the architectural team will work in tandem with the exhibit team.

- A: HEWV's role is to facilitate the coordination of the teams, and to coordinate the input from the varied constituencies with the Museum, University, and DFCM. There will be monthly coordinating meetings with all the team members (second Monday and Tuesday of each month through November) and there may be additional meetings. We want the building and exhibit plans to develop simultaneously.
- Q: Are specifications for interactives to be part of the exhibit plan?
- A: The master plan should outline what kinds of interactives will be needed in which galleries to the degree that the architectural program can address the technical needs of those spaces.
- Q: What is the involvement of the community in the process? How might community input change your concepts of the Museum?
- A: We have already had extensive conversations with many constituencies and the ideas that have come out of those are included in the basic concepts in our exhibits philosophy. Therefore, we don't anticipate any major changes.
- Q: Elaborate on the expertise you have in the Museum
- A: Exhibits department of 4, including a developer; 4 curators (archaeology, vertebrate paleontology, vertebrate zoology, botany), collections management staff, some with extended expertise (minerals, entomology); education department with expertise in at-risk youth, public programs, outreach, school programs; marketing, audience research, public relations, development, art director, IT, part-time conservator. No A-V expertise.
- Q: How do you see the staff growing?
- A: This is being considered as part of the business plan update.
- Q: Would you expect proposals to include audience research? Will in-house information be available?
- A: Yes.
- Q: Will events requiring catering facilities be held in the new building?
- A: Yes
- Q: To what extent would you like to consider living components?

- A: As appropriate. We currently partner with other groups (Hogle Zoo, Tracy Aviary, Hawkwatch) to bring in live animals and would expect this to continue. We don't intend to become a zoo.
- Q: You want three completed master plans from the last 5 years? Do you also want design plans?
- A: Yes. No.
- Q: Are you prepared for staffing needs to maintain interactive exhibits?
- A: That is being addressed in the business plan, but we recognize that this will be a need
- Q: Is phasing a consideration?
- A: Yes
- Q: Is it a given that parking be under the building?
- A: We would consider alternatives that would also minimize the impact on the site. We are not interested in surface parking lots.
- Q: Will Red Butte Garden and Arboretum connect with the new Museum or be completely separate?
- A: Red Butte is currently re-working its master plan, and discussions are just beginning about the potential for sharing some facilities and having other potential connections.
- Q: Have you looked at light rail connections, other public transportation alternatives, and sharing parking with Red Butte?
- A: Yes, and a detailed transportation/traffic analysis will be done during the program phase, but not as a part of these contracts.
- Q: Will the Shoreline trail be the primary pedestrian route from the Museum to This is the Place State Park and Hogle Zoo? Will it be paved?
- A: Yes. No.
- Q: What are the greatest challenges of the project?
- A: The site—its location and slope and potential controversy surrounding its development. Also, we likely can't do everything we want to and will have to make some choices.

- Q: For school groups, will there be drop-off/pick-up or will we have to provide bus parking?
- A: Will be looking at this issue as part of the transportation analysis.
- Q: What is the process for asking further questions?
- A: Questions may be asked by FAX or email by March 21, 2003.
- Q: Can the land in the conservation easement be used?
- A: Very strict limitations are in place, but certainly trails are possible.
- Q: What is the size of the easement?
- A: 690 acres.
- Q: Is the site map in the materials on-line?
- A: Yes—in the pre-planning study.

Questions and Answers during Exhibit Masterplanning Site Visit

- 1.18. Q: What leeway is available for developing trails?
- A: There already are a number of trails on and around the site, but the topic is open for discussion.
- Q: Is a topographic survey available?
- A: Not a detailed one. DFCM will be doing this.
- Q: Where will the building be sited?
- A: We anticipate siting it below the trail, and want it to take advantage of the existing trails on the site.
- Q: Is the site of archaeological significance?
- A: There will be an archaeological survey done, but we don't anticipate any major findings. This was formerly part of the Fort Douglas artillery range, and it has been swept.
- Q: Will you close trails?

- A: We plan to maintain access to the site (i.e. not fence).
- Q: Do you plan to re-vegetate?
- A: We have not made such plans, but if we do, we will focus on native plant communities.
- Q: Is it a native habitat for deer?
- A: Yes, particularly in the winter. We do not intend to fence and we intend to maintain the native habitat as much as possible; this is a good alternative to a commercial building with bluegrass for this site.
- Q: What is the size of the site?
- A: 14 acres. To the south there are two parcels of 9 acres each, which will be developed commercially.
- Q: Is the Shoreline Trail recognized as a hiking/biking trail?
- A: Yes, heavily used. It extends from Ogden to Provo with some breaks.
- Q: Has any archaeological work been done?
- A: Nearby for the Olympic Village/student housing a study yielded considerable historical archaeological material and some prehistoric material. It is at a lower elevation along Red Butte Creek which, contrasted with the Museum site, would be expected to yield more.
- Q: Is a Utah business license required for either the master plan or program?
- A: No.
- Q: Has a funding feasibility study been done for the project?
- A: A formal study has not been done. The Museum is working closely with the University and its extensive development resources on the campaign.
- Q: Is an environmental assessment required?
- A: No, but it will be done and we are working with HEWV on the scope of that work.
- Q: What percentage of the Museums collections are on display now?
- A: Less than 1/10 of 1%

Q: Do you have interpretive story line done?

A: No. We have many ideas and an exhibits philosophy.

Questions and Answers during Architectural Programming Mandatory Meeting

1.19. Q: When asking bidders to describe potential risks and how to avoid them, to what are you referring?

A: For example, there are many risks associated with the site, its slope, people who currently use it.

Q: What environmental assessment has been conducted?

A: None as yet, but an environmental analysis will be done during the program phase, but not as a part of these contracts.

Q: Will HEWV address civil engineering and landscaping?

A: Civil engineering will be done during the program phase, but not as a part of these contracts. Site planning also will be addressed in this phase.

Q: The requirement is to provide references for three architectural programs that have been completed. Must they be natural history museum projects?

A: No, but they should be as closely related to this project as possible. Also, the construction of these projects need not be complete, but at least underway.

Q: Must the programming have been done in the last 5 years?

A: Yes

Q: What are the limitations of what can be done in the conservation area adjacent to the Museum site?

A: That is part of the scope of the exhibits master planner, not the architectural program

Q: How does the role of HEWV fit with the architectural programmer?

A: HEWV will coordinate the work of the programmer and master planner, coordinate the community input, and produce the final document which will include the architectural program and exhibits master plan.

- Q: With a 35 page limit, can both sides of each page be used?
- A: Yes, but we'd prefer not.
- Q: Will Research Park's design review board have any input?
- A: We will meet with them as well as with a variety of other groups.
- Q: Clarify the shortlisting process?
- A: The selection committee (see above), with input from other readers (see above) will shortlist 4 firms for each of the contracts. This will take place on March 31, 2003.
- Q: What are the milestone dates for project delivery?
- A: The program and master plan will be completed at the end of the calendar year. Editing will take place in January of 2004, and the document produce by the end of March 2004.
- Q: Will there be a bonus for early completion?
- A: No.
- Q: Will the same selection committee do both selections?
- A: Yes
- Q: Please clarify the language about "program project cost summary" vs. "project budget estimate."
- A: They are the same thing.
- Q: Does the order of presentation material matter?
- A: No, but tabs would be very helpful for the readers.
- Q: Is the underground parking for both staff and visitors?
- A: Yes. See the pre-planning study.
- Q: Have any discussions been held about extending shuttle service to the site?
- A: Yes, with other members of the Emigration Visitors District (Red Butte, Hogle Zoo, This is the Place), and with UTA. No definite plans in place.

Q: Do you expect the architectural programmer to organize community dialogue groups or will HEWV do this?

A: HEWV

Q: Do you envision the monthly meetings to be coordination or programming?

A: Primarily coordination. Additional meetings for programming will be scheduled as needed and appropriate.

Q: What federal state, local agencies will be involved? Is there a steering committee that's been organized to coordinate these groups?

A: There are a number of federal and a few state agencies aside from DFCM that will be providing input (to be coordinated by HEWV). DFCM is the only state agency with oversight of the project.

Q: Are you considering collections tours (e.g. paid)?

A: Prefer visible storage.

Q: What level of detail do you require in outlining or identifying all sub-contractors?

A: The University's and DFCM's programming guidelines regarding subcontractors are on the Web, and they outline the level of detail we expect.

Q: With respect to climate control systems, do you want a detailed plan or indications of needed end results?

A: Detailed plan

Q: Will more studies be provided to the shortlisted firms?

A: No

Questions and Answers during Architectural Programming Site Visit

1.20. Q: What is the visitation by schools by %?

A: 26%

Q: What is the visitation by University students by %?

A: 2%

- Q: How is the freeway access?
- A: Good to the south via Foothill Drive (I-80 E, I-215S); improved to the west via 400 South (I-80 W, I-15).
- Q: Will topographic and geological surveys be done?
- A: Yes, by DFCM
- Q: Is the site exempt from City regulations?
- A: Yes, as Research Park is part of the University, however we will work with the city when it comes to utility connections, water, and power.
- Q: Are you interested in LEEDS rating?
- A: We are interested in having the most environmentally efficient building possible, and want the concepts incorporated in the building to be interpreted in the galleries.
- Q: Is there much offsite interpretive duplication with other organizations such as the Planetarium or the Museum of Church History and Art?
- A: No. There are several complementary institutions, some with some degree of overlap.
- Q: What offsite storage do you have? Square feet? Do you want to get it all in the new Museum?
- A: Two offsite storage facilities with less than 10,000 square feet are used. Yes.
- Q: Has a collections analysis been done?
- A: A detailed analysis was done in 1994 and it currently is being updated.

End of Addendum I